

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Thailand

Post: Bangkok

Update on Thailand's Broiler Production Supply and Demand

Report Categories:

Market Development Reports

Poultry and Products

Approved By:

Rey Santella, Agricultural Attaché

Prepared By:

Sakchai Preechajarn, Agricultural Specialist

Report Highlights:

TH4011. On December 25, 2013, Japan reopened its market to imports of Thai frozen uncooked chicken. Thailand expects to export nearly 50,000 metric tons of uncooked chicken meat to Japan in 2014. Thailand's broiler PS&D table has been revised accordingly.

Executive Summary

On December 25, 2013, Japan's Ministry of Agriculture, Forestry and Fisheries notified Thailand's Agricultural Affairs Office that Japan would immediately reopen its market to imports of Thai frozen uncooked chicken. Thailand's uncooked chicken was banned in January 2004 when an outbreak of highly pathogenic avian influenza (HPAI) bird-flu was detected.

Post has revised Thailand's broiler meat production, supply and demand (PS&D) table to reflect this development. The following is a summary of Thailand's current poultry production situation.

In 2013, Thailand's chicken production is expected to show a little stagnation because of the exit of Saha Farms (SF), one of the largest poultry operations in the country, from the Thai poultry market. SF's departure is expected to enable the rest of Thailand's poultry producers to increase their production, although it will just be enough to fill the void left by SF. Post estimates Thailand's 2013 poultry production to remain at similar levels as the previous year and will unlikely meet the high export demand. Total chicken meat exports (both uncooked and cooked products), accordingly, are estimated to decline to 520,000 metric tons (MT) from 538,000 MT in 2012.

Trade sources indicate that increased market access for uncooked products to Japan should spur growth for Thai chicken exports in 2014. Anticipated economic growth in Japan and the European Union are also expected to fuel demand for Thai poultry products. Total exports in 2014 are forecast to rise by 12 percent to 580,000 MT. Thailand's broiler production in 2014 should grow by 6-7 percent in line with the increased export opportunities.

According to the Thai Broiler Processing Exporters Association, the resumption of Thai poultry exports to Japan should not affect the U.S. market share of Japan's poultry market. Industry sources claimed that Thailand's presence will instead capture market share from Brazil since product lines from the two countries are similar (i.e. boneless fancy cuts while nearly all of U.S. products exported to Japan are bone-in chicken).

Poultry, Meat, Broiler Thailand	2012		2013		2014		
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Inventory (Reference)	0	0	0	0	0	0	(MIL HEAD)
Slaughter (Reference)	0	0	0	0	0	0	(MIL HEAD)
Beginning Stocks	52	52	133	133	84	104	(1000 MT)
Production	1,550	1,550	1,500	1,500	1,625	1,600	(1000 MT)
Total Imports	1	1	1	1	1	1	(1000 MT)
Total Supply	1,603	1,603	1,634	1,634	1,710	1,705	(1000 MT)
Total Exports	538	538	540	520	580	580	(1000 MT)
Human Consumption	922	922	1,000	1,000	1,035	1,035	(1000 MT)
Other Use, Losses	10	10	10	10	10	10	(1000 MT)
Total Dom. Consumption	932	932	1,010	1,010	1,045	1,045	(1000 MT)
Total Use	1,470	1,470	1,550	1,530	1,625	1,625	(1000 MT)
Ending Stocks	133	133	84	104	85	80	(1000 MT)
Total Distribution	1,603	1,603	1,634	1,634	1,710	1,705	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	(1000 MT)
Balance	0	0	0	0	0	0	(1000 MT)
Inventory Balance	81	81	-49	-29	1	-24	(1000 MT)
Production Change	15	15	-3	-3	8	7	(PERCENT)
Import Change	0	0	0	0	0	0	(PERCENT)
Export Change	15	15	0	-3	7	12	(PERCENT)
Consumption Change	8	8	8	8	3	3	(PERCENT)
Imports Percent Consumption	0	0	0	0	0	0	(PERCENT)
Exports Percent Production	35	35	36	35	36	36	(PERCENT)
Population	67,091,089	67,091,089	67,448,120	67,448,120	67,790,617	67,790,617	(PEOPLE)
Per Capita Consumption	14		15		15		(KG)
TS=TD		0		0		0	

End of Report.